


# 2025 CUSTOMER VALUE LEADER

*Maximizing the Price/Performance ROI for Customers*

*RECOGNIZED FOR BEST PRACTICES IN THE EUROPEAN TELEMATICS SOLUTION INDUSTRY*

FROST & SULLIVAN

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## Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. CANGO Mobility excels in many of the criteria in the telematics solutions space.

| RECOGNITION CRITERIA | |
|---|---|
| *Business Impact* | *Customer Impact* |
| Financial Performance | Price/Performance Value |
| Customer Acquisition | Customer Purchase Experience |
| Operational Efficiency | Customer Ownership Experience |
| Growth Potential | Customer Service Experience |
| Human Capital | Brand Equity |

## The Strategic Imperative: 8 Factors Creating Pressure on Growth

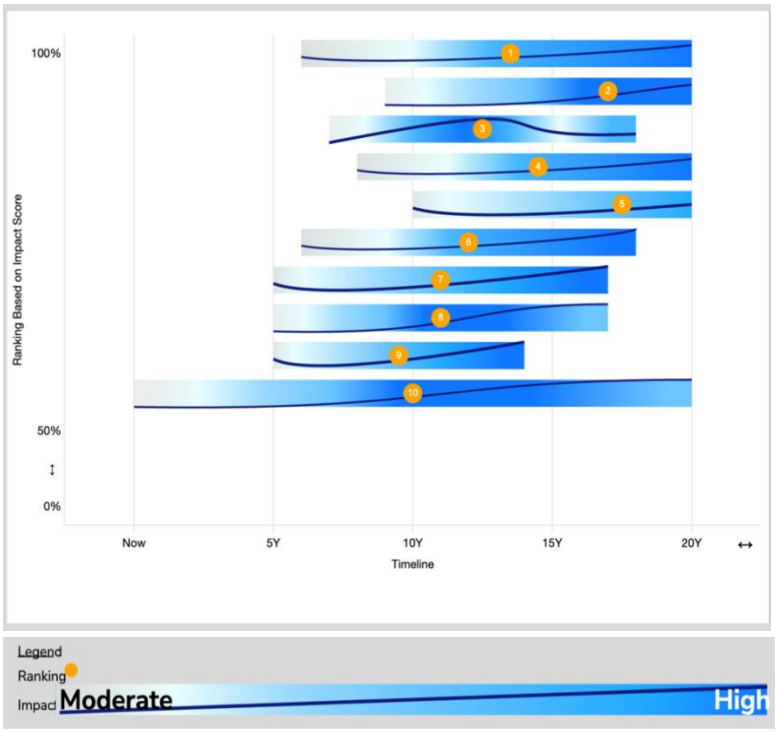



- **Innovative Business Models:** A new revenue model that defines how a company creates and capitalizes economic value, typically impacting its value proposition, product offering, operational strategies, and brand positioning
- **Customer Value Chain Compression:** Customer value chain compression as a result of advanced technologies, internet platforms, and other direct-to-consumer models that enables the reduction of friction and the number of steps in customer journeys
- **Transformative Megatrends:** Global forces that define the future world with their far-reaching impact on business, societies, economies, cultures, and personal lives
- **Disruptive Technologies:** New, disruptive technologies that are displacing the old, and significantly altering the way consumers, industries, or businesses operate
- **Internal Challenges:** The internal organizational behaviors that prevent a company from making required changes

- **Competitive Intensity:** A new wave of competition from start-ups and digital business models that challenge the standing conventions of the past, compelling established industries to re-think their competitive stance
- **Geopolitical Chaos:** Chaos and disorder arising from political discord, natural calamities, pandemics, and social unrest that impact global trade, collaboration, and business security
- **Industry Convergence:** Collaboration between previously disparate industries to deliver on whitespace cross-industry growth opportunities

## Top Transformations Impacting Growth in the European Telematics Solutions Industry

| Rank | Strategic Imperative | Timeline | Impact (%) | Impact Curve |
|---|---|---|---|---|
| 1 | **Transformative Mega Trends** Increased use of autonomous vehicles in public and private transport | 2031 - 46 | 64 | Polynomial |
| 2 | **Internal Challenges** Integration of diverse technology platforms across fleet systems | 2034 - 50 | 62 | Logistic |
| 3 | **Compression of Value Chains** Automated supply chain integration for real-time asset management | 2032 - 43 | 61 | Oscillatory |
| 4 | **Geopolitical Chaos** Strategies for managing fleet operations amid political instability | 2033 - 46 | 60 | Polynomial |
| 5 | **Industry Convergence** Cross-industry data platforms for enhanced fleet management | 2035 - 50 | 59 | Exponential |
| 6 | **Competitive Intensity** Rise of startups specializing in AI-driven fleet analytics | 2031 - 43 | 58 | Polynomial |
| 7 | **Disruptive Technologies** Development of cybersecurity measures for connected fleets | 2030 - 42 | 57 | Exponential |
| 8 | **Innovative Business Models** Subscription services for autonomous fleet vehicles | 2030 - 42 | 56 | Logistic |
| 9 | **Geopolitical Chaos** Adaptation to new trade tariffs and their impact on fleet costs | 2030 - 39 | 54 | Exponential |
| 10 | **Transformative Mega Trends** Adoption of electric fleets driven by EU carbon policies | 2025 - 45 | 53 | Logistic |




## The Transformation of the Telematics Industry

The European telematics solutions industry is experiencing a significant transformation fueled by the rapid expansion of connected vehicles, stringent regulations on for data management, and the rising demand for data-driven operational efficiency. As industries across logistics, insurance, and automotive manufacturing embrace digitalization, telematics providers must deliver advanced solutions that enhance vehicle tracking, predictive maintenance, and driver safety. Integrating artificial intelligence (AI), cloud-based analytics, and real-time data processing is now a fundamental requirement rather than a competitive differentiator. In this regard, regulatory frameworks (e.g., the European Union Mobility Package and General Data Protection Regulation) shape market dynamics by enforcing strict compliance on vehicle tracking, data security, and emissions reporting.

Beyond compliance and optimization, the industry is also capitalizing on the vast potential of telematics-generated data to develop new business models. By transforming raw vehicle insights into actionable intelligence, companies can unlock additional value through services such as dynamic pricing, usage-based leasing, and predictive risk assessments. Additionally, the growing emphasis on sustainability and carbon footprint reduction drives adoption among commercial fleets looking to optimize routes and reduce fuel consumption. For example, insurance companies leverage telematics for usage-based pricing models, while original equipment manufacturers (OEMs) integrate embedded telematics to offer subscription-based vehicle services.

However, despite strong market momentum, vending companies face challenges in sustaining growth. High implementation costs, data privacy concerns, and the fragmentation of telematics standards across European markets present barriers to scalability. While data collection frameworks exist, variations in

> *"The CANLIB - CANbus Library transforms standard telematics devices into fleet management tools, something that is yet to be seen in other geographical areas and serves multiple industry verticals."*
>
> ***- Ana Victoria Dominguez***
> ***Best Practices Research Analyst***

hardware usage create inconsistencies. Most insurance providers, for instance, rely on either on-board hardware or on-board diagnostics (OBD) to gather vehicle data. However, while OBD access is widely available, on-board systems are often proprietary, restricting interoperability and complicating cross-market standardization. This lack of uniformity increases compliance burdens and limits seamless data integration, hindering broader adoption of telematics-driven solutions.

To address these challenges, telematics companies are investing in AI-driven automation and edge computing with third-party platforms. Standardization efforts are also underway to harmonize data-sharing protocols, ensuring seamless integration across fleet management systems. Furthermore, partnerships with telecom operators and cloud vendors are a becoming a prime example of enhanced connectivity, while modular, subscription-based business models are making advanced telematics more accessible to small and medium enterprises. As the industry continues its upward trajectory, success will hinge on balancing innovation with regulatory compliance, security, and cost-effectiveness.

### CANLIB - CANbus Library: Long-term Value

CANGO Mobility delivers high-performance solutions that optimize fleet management, improve vehicle connectivity, and reduce costs. Its proprietary software component, the Canvas Library, offers a hardware-agnostic middleware that seamlessly integrates with third-party telematics devices. It eliminates the need for costly additional hardware, significantly lowering business expenses. Clients gain access to advanced vehicle diagnostics, driver behavior analytics, and security features at a lower price than competing solutions.

CANGO Mobility works closely with clients during the purchasing experience to develop tailored telematics solutions that address specific operational needs. Many fleet operators face budget constraints, making cost-effective, high-performance systems essential. By integrating its software free of charge into existing devices, the company enables customers to develop fleet management capabilities without replacing hardware, minimizing costs and downtime. This approach strengthens relationships with key industry players, including Trapeze, Mitac, Queclink, and Howen, reinforcing the company's reputation for delivering scalable solutions that align with market demands.

Once implemented, CANGO Mobility's solutions advance customer ownership experience with long-term value and adaptability. The CANbus Library transforms standard telematics devices into fleet management tools, something that is yet to be seen in other geographical areas and serves multiple industry verticals. In a taxi fleet management project, for example, CANGO developed a solution that streamlined driver and key management, enhancing security, and reducing operational oversight. Given that multiple drivers often share the same vehicle, the system allowed operators to monitor and control vehicle access remotely, ensuring better coordination and minimizing the risks associated with key mismanagement. Similarly, in car-sharing applications, the company's software ensures that only authorized drivers can start the vehicle, reducing unauthorized usage. By extending the functionality of telematics systems, CANGO Mobility strengthens customer satisfaction.

Excellent customer service is integral to long-term client success. To provide efficient support, CANGO Mobility developed the Canbus.Academy, a 24/7 online platform featuring technical documentation, installation guides, and telematics training. This initiative equips customers and field engineers with the tools to maximize product performance and resolve issues independently. The widespread adoption of the Academy, including by competitors, highlights its impact on industry standards. By reducing dependence on direct technical support and increasing self-service capabilities, the company enhances user experience and streamlines operations.

### High-value Solutions, Long-lasting Relationships

> *"As the global demand for software-defined vehicle solutions grows, CANGO Mobility is positioned for continued market expansion and long-term profitability."*
>
> ***- Kamalesh Mohanarangam***
> ***Associate Director***

CANGO Mobility's ability to acquire customers, optimize operations, and drive sustained growth boosts its market leadership. Its software integration process prioritizes speed and simplicity, lowering adoption barriers while ensuring broad market applicability. Strategic partnerships with leading hardware manufacturers, including ZF and Continental, expand market reach while maintaining high service standards. Additionally, the company's adaptability for aftermarket and OEM applications is demonstrated by collaborations with vehicle manufacturers in Turkey and industry leaders such as Porsche, strengthening its competitive position.

Customer acquisition is fueled by the ability to offer distinct, high-value solutions that set the provider apart from traditional telematics firms. Its software-defined vehicle approach attracts global telematics companies. Word-of-mouth referrals play an important role in the expansion, as new clients seek the technology after witnessing successful implementations by established industry players. By delivering adaptable, cost-efficient solutions, CANGO Mobility strengthens its market presence across diverse sectors.

Resource optimization remains a core priority. A lean but highly skilled workforce enables rapid development cycles and responsive adjustments to market demands. By retrofitting existing telematics devices with its software rather than requiring new hardware, CANGO Mobility reduces client costs while accelerating deployment. Additionally, advancements in video telematics integration have improved driver monitoring and enhanced Advanced Driver Assistance Systems functionality.

Growth potential is driven by ongoing expansion into new telematics applications. In this regard, CANGO Mobility continues to develop additional functionalities for the CANLIB - CANbus Library, assuring solutions remain relevant as fleet management technology evolves. By merging traditional telematics data with real-time video analytics, it enhances safety, efficiency, and operational control. As the global demand for software-defined vehicle solutions grows, CANGO Mobility is positioned for continued market expansion and long-term profitability.

In addition, the company fosters a culture of continuous learning and technical excellence through collaboration with the Polytechnic University in Romania, securing a steady pipeline of skilled professionals. Specialized training programs and internal development initiatives enhance workforce

expertise, driving innovation across product offerings. The Canbus.Academy extends this commitment by providing structured education for technicians and engineers, solidifying the company's role as a telematics training and support leader.

By integrating technological advancements with strategic execution, CANGO Mobility sets industry benchmarks in telematics solutions. Its ability to deliver cutting-edge software, maintain high-quality customer support, and drive business efficiency ensures sustained growth and market leadership. Through ongoing refinement of its products and services, the company remains at the forefront of fleet management and vehicle connectivity.

## Conclusion

CANGO Mobility earns recognition as a leader in the telematics industry through its innovative, cost-effective solutions that optimize fleet management, enhance vehicle connectivity, and improve operational efficiency. By integrating its proprietary middleware CANLIB - CANbus Library with existing telematics devices, the company delivers high-performance, scalable solutions that meet diverse industry needs. Strategic partnerships with key hardware manufacturers and vehicle makers and its ability to provide tailored solutions and customer-centric support, reinforce its competitive position. CANGO Mobility's commitment to continuous innovation, customer satisfaction, and technical excellence cements its role as a driving force in the evolution of fleet management technology.

With its strong overall performance, CANGO Mobility earns Frost & Sullivan's 2025 European Customer Value Leadership Recognition in the telematics solutions industry.

# What You Need to Know about the Customer Value Leadership Recognition

Frost & Sullivan's Customer Value Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

## Best Practices Recognition Analysis

For the Customer Value Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

### Business Impact

**Financial Performance:** Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

**Customer Acquisition:** Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

**Operational Efficiency:** Company staff performs assigned tasks productively, quickly, and to a high-quality standard

**Growth Potential:** Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

**Human Capital:** Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

### Customer Impact

**Price/Performance Value**: Products or services offer the best ROI and superior value compared to similar market offerings

**Customer Purchase Experience**: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

**Customer Ownership Excellence**: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

**Customer Service Experience**: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

**Brand Equity**: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

# Best Practices Recognition Analytics Methodology

## Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

| | | VALUE IMPACT | |
|---|---|---|---|
| STEP | | WHAT | WHY |
| 1 | **Opportunity Universe** | Identify Sectors with the Greatest Impact on the Global Economy | Value to Economic Development |
| 2 | **Transformational Model** | Analyze Strategic Imperatives That Drive Transformation | Understand and Create a Winning Strategy |
| 3 | **Ecosystem** | Map Critical Value Chains | Comprehensive Community that Shapes the Sector |
| 4 | **Growth Generator** | Data Foundation That Provides Decision Support System | Spark Opportunities and Accelerate Decision-making |
| 5 | **Growth Opportunities** | Identify Opportunities Generated by Companies | Drive the Transformation of the Industry |
| 6 | **Frost Radar** | Benchmark Companies on Future Growth Potential | Identify Most Powerful Companies to Action |
| 7 | **Best Practices** | Identify Companies Achieving Best Practices in All Critical Perspectives | Inspire the World |
| 8 | **Companies to Action** | Tell Your Story to the World (BICEP*) | Ecosystem Community Supporting Future Success |

*Board of Directors, Investors, Customers, Employees, Partners

## About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

### The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

Learn more.

***Key Impacts***:

- **Growth Pipeline:** *Continuous Flow of Growth Opportunities*
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** *Optimized Customer Experience*
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** *Industry Leadership*




### The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

***Analytical Perspectives***:

- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)

